

Oil and Natural Gas Stimulate

Oil and natural gas are driving the U.S. economy through a major energy boom and that boom is rippling through the economy of Ohio, supporting business activity across the state. This finding grows out of a new American Petroleum Institute survey of domestic oil and natural gas vendors,¹ which offers a glimpse into the job and business creation engine that is the current oil and natural gas industry. The survey shows that at least 636 businesses, spread across all 16 of Ohio's congressional districts, are part of the larger oil and natural gas supply chain. And this is clearly a small snapshot of the vast number of business throughout Ohio who are benefitting from shale development, with the Ohio Department of Job and Family Services reporting that there are more than 13,000 shale-related business establishments in the state.²

The survey's snapshot of state-by-state activity reinforces the impressive level of industry success throughout the country that is documented in a recent PriceWaterhouseCoopers study conducted for the American Petroleum Institute.³ That study found that the oil and natural gas industry in Ohio supports some 255,100 jobs, which is 3.9 percent of the state's total employment. The amount of Ohio labor income supported by the oil and natural gas industry comes to \$12.7 billion annually. That's 4.1 percent of the state's total labor income.

Although Ohio is not a top U.S. energy producerthese job and labor income figures demonstrate that the people of Ohio enjoy significant benefits from energy development.⁴ The benefits show up in the state's salary statistics as well. Thus, while the average annual salary in Ohio across all industries and sectors is \$44,059, the average oil and gas industry salary (excluding gas stations) is substantially higher—\$72,238 annually. Overall the industry supports \$28.4 billion of the Ohio economy. That's 5.7 percent of the state's total economic activity.

Ohio particularly benefits from the production of oil and natural gas from shales and so-called "tight formations," energy development that uses the proven engineering technologies of hydraulic

 Ohio Department of Job and Family Services, "Quarterly Economic Trends for Ohio Oil and Gas Industries", April 2014, http://ohiolmi .com/OhioShale/Ohio%20Shale%20report-April2014-2013Q3.pdf

2. American Petroleum Institute, "API Onshore Oil and Gas Vendor Identification Survey," Washington, D.C., 2014. The survey was distributed to API members in January 2014 to collect information for the period October 2012 to September 2013. Included in the survey are companies that provide goods and services for onshore oil and natural gas development, whether as operators, contractors, service companies, suppliers, or vendors.

 Information cited in this paragraph comes from the Bureau of Labor Statistics, Quarterly Census of Employment and Wages (preliminary data for 2013 accessed July 2014); and PriceWaterhouseCoopers, "The Economic Impacts of the Oil and Natural Gas Industry on the U.S. Economy: Employment, Labor Income and Value Added," 7/12/13 (based on 2012 IMPLAN database).

4. All information cited in this paragraph comes from http://www.api.org/~/media/Files/Policy/Jobs/EnergyWorks/EnergyWorks_Ohio-API.pdf. Data based on Bureau of Labor Statistics, Quarterly Census of Employment and Wages (preliminary data for 2012 accessed 7/18/2013); U.S. Energy Information Administration; and PriceWaterhouseCoopers, "The Economic Impacts of the Oil and Natural Gas Industry on the U.S. Economy: Employment, Labor Income and Value Added," 7/12/13 (based on 2012 IMPLAN database).

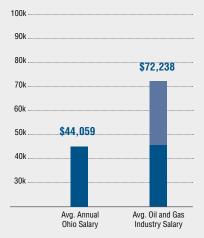
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\$28.4 BILLION The industry contributes to ohio's economy

255,100 Ohio Jobs

SUPPORTED BY OIL AND NATURAL GAS INDUSTRY

AVERAGE ANNUAL SALARY COMPARISON





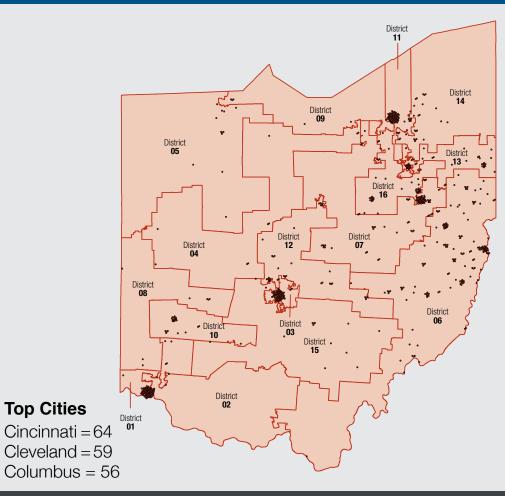
State: Ohio

Vendors by Congressional District

Congressional District	Total
Congressional District 1	5
Congressional District 2	66
Congressional District 3	58
Congressional District 4	11
Congressional District 5	12
Congressional District 6	152
Congressional District 7	77
Congressional District 8	7
Congressional District 9	6
Congressional District 10	22
Congressional District 11	78
Congressional District 12	35
Congressional District 13	27
Congressional District 14	27
Congressional District 15	14
Congressional District 16	39
Grand Total	636

Ohio Vendors by Congressional District

District Location



Sources: Esri, DeLorme, NAVTEO, TomTom, Intermap, increment P Corp., GEBCO, USGS, FAO, NPS, NRCAN, GeoBase, IGN, Kadaster NL, Ordnance Survey, Esri Japan, METI, Esri China (Hong Kong), and the GIS User Community

fracturing, or "fracking," and horizontal drilling. Total jobs supported by these activities in Ohio reached 38,830 in 2012. That job total is projected to climb to 143,595 in 2020 and to 266,624 in 2035.⁵

And the people of Ohio get it. A state-wide telephone poll of 600 registered Ohio voters, conducted on behalf of the American

Petroleum Institute, found that 79 percent of them, regardless of party affiliation, support increased production of oil and natural gas resources located here in the United States.⁶

 IHS Inc., "America's New Energy Future: The Unconventional Oil and Gas Revolution and the U.S. Economy," Washington, D.C., December 2012.

 "What America is Thinking on Energy Issues.""http://www.api.org/news-and-media/news/newsitems/2014/apr-2014/poll-largemajorities-of-ohio-voters-support-investments-in-oil-natural-gas", the results of an Ohio poll conducted by Harris for API April 3-7, 2014. Click on "a new poll" to see how percentages of voters answered this and other questions.



To find out more, visit API.org for more information and follow us on Twitter@**EnergyTomorrow**.

Congressional District 1

Cincinnati Heat Exchangers, Inc Cintas Corporation Hendersons Greenpro Hubert Company Kelchner, Inc

Congressional District 2

Advanced Technologies Support Gro Al Never, LLC Anchor Fluid Power Appalachian Wireless Argus International, Inc Automated Packaging, Inc Baerlocher Production USA, LLC Baro Controls, Baro Process Baro Holdings, Inc Belcan Corporation BHS Marketing, LLC **BMI** General Licensing Broadcast Music, Inc. Carey Digital Carlton E. Bertt, PhD Carmeuse Lime & Stone, Inc Cast-Fab Technologies, Inc Champion Optical Network Engineering, LLC Chemical Associates, Inc Cintas Corporation Cintas Document Management Cintas First Aid & Safety Columbia Gas of Ohio Crane 1 Services, Inc. **CSX** Transportation Dinsmore & Shohl LLP DTE Energy Effox - Flextor Emery Oleochemicals, LLC FCX Performance Fifth Third Leasing Company Fisher Scientific Co Five Machining System, Inc Global Crossing Telecommunications Hydrotech, Inc Informatica Corporation Internal Revenue Service J Flow Controls Kratos Public Safety & Security Louisiana Transportation, Inc Mazak Corporation Micro Motion, Inc Mobile Mini, Inc Ohmart Vega Corporation Panelmatic Texas, Inc Pierce Pump Company, Inc Pilsen Imports, Inc PME of Ohio Raco Industries, LLC Recruitmilitary, LLC

Richard Industries Jordan Division Safelite Fulfillment, Inc Sensidvne LP Telvent Dtn. Inc Terminix Processing Center The Pilcher Group Thermo Electron Corporation Thermo Environmental Inst Thermo Labsystems, Inc Thermo Process Instruments LP T-Mobile USA, Inc Total Quality Logistics, LLC Total Safety, Inc Ungers & Associates, Inc Vega Americas, Inc Wesco Distribution, Inc

Congressional District 3

Ajax Tocco Allied Corporation, Inc Alro Steel Ametek Solidstate Controls Atos Origin It Services I Battelle Memorial Institute Blue Dot Energy Services, LLC Blues For A Cure **Bolttech Mannings** Bricker & Eckler LLP Burgess & Niple, Inc BW Rogers Company Canton Drop Forge Capital City Group, Inc Chase Equipment Finance, Inc Circle S Transport, Inc Continental Message Solution, Inc CTL Engineering, Inc Dependable Power Systems Edison Equipment, LLC Edison Welding Institute, Inc EWI Exco Resources Pa, Inc Exponentia US, Inc FCX Performance, Inc Fire-Dex. LLC Fives North American Combustion Inc. Home Depot Credit Services IRTH Solutions, Inc Joe Knows Energy Kimball Midwest Lapham-Hickey Steel Lehigh Heavy Forge Corporation. Mavfarm International Mettler Toledo, LLC Miba Bearings Us, LLC National Pump & Process Ochmanek Group, LLC Ohio Association of Foodbanks Ohio State University

Ohio Transmission & Pump Ohio Transmission Corporation OOGA Primatech. Inc Profound Logic Software, Inc Sarcom, Inc Sea Ltd Shell Shelly Materials, Inc Solidstate Controls, LLC Spellacy, Inc Strategic Public Partners, LLC Supply Technologies, LLC TFL Distribution, LLC The Home Depot The National Board of Boiler & Pressure Vessel Inspectors United Controls Group, Inc Vorys Sater Seymour & Pease

Congressional District 4

3Circle Partners, LLC Atlas Industries, Inc Beckett Jeffrey M. Clifford R. Goytowski Elyria Foundry Enercon Systems, Inc LP Hoying, LLC Nachurs Alpine Solutions St. Marys Foundry, Inc Univenture, Inc Wilson Bohannan Padlock Co

Congressional District 5

A Gas Remtec Bunting Bearings Corp Daymark Safety Systems Engineering and Technical Association Ground Control Erosion Control Jerl Machine, Inc Kenton Iron Products, Inc One Aquasource, Inc Reclamation Technologies, Inc Remtec International The Mannik & Smith Group, Inc The National Lime & Stone Co ACI Services, Inc

Congressional District 6

Adena Lions Club Advanced Landscaping Afcom American Cancer Society American Legion Argonne Post Apex Environmental, LLC Apollo Pro Cleaning Barclay Rolls Beatrice V. Allensworth Belmont College Foundation, Inc

OHIO - VENDOR LIST

Betty Blazer Bishop John King Mussio Jr. Hiah Borden Office Equipment Company Brian Wagner Bryan Eureka Buckeye Local School District Buckeye Water Service Company Cadiz Food Pantry Cadiz Lions Club Calvin & Tyra Pethtel Calvin E. Reed Capstone Holding Company Carl Westover Carol Goff Carroll Electric Cooperative Catholic Central High School Charles Culler Cort Business Services Corporation. Crystal Clear Window & Gutter Cumberland Trail Fire District #4 Dale Henceroth Dannie & Judith Baker David Bodo & Associates, Inc David Irvin David R. Miller Dennis Bogdan Doris L. Burkhart Dorsey Oil & Gas, LLC Drew & Christine Riffle Dusti R. Pickens Dynamic Structures, Inc Eastern Automated PipingInc Electronic Design For Industry, Inc Erwin Septic Service, LLC Fairfield Machine Co., Inc Fairview & Community Volunteer Fire Protection Service Ltd Franciscan University of Full Circle Oil Field Services, Inc Gary A. & Debra Staten George Moser Grae-Con Construction, Inc Green & Associates, LLC Gregory Fisher Guernsey County Agricultural Guernsey Muskingum Electric Coopera Harcatus Tri County C.A.O., Inc Herbert D. & Linda S. Mcclain Hopedale Softball Associaton Hopedale Volunteer Fire Department Horner Excavating Ltd Howard L. Bowers Contracting Hunter Kirkwood Farms, LLC James & Vickie Herold James C. & Velma .F Booth

James O. Moats Jefferson Investigators and Jefferson Landmark, Inc John E. Riley Jr John F. Fuchs & Marcia R. Fuchs John N. Balik John Neider John P. Dutton John R. Mrugala Jonathan A. Bedway Joseph B. Fillipovich JW Stenger Trucking, Inc Keith & Judith Burgett Ken Miller Supply of West Virginia Kinferco, LLC Kirke B. Porterfield Lansberry Properties, LLC Lanzer Excavating, LLC Lash Paving, Inc Maan Power Services Marietta College Mary Ruth Kidd Middleton Township Mingo Business Association Modular Security Systems, Inc Morsheiser Family Rev Liv Tr Motorcyclist Memorial Foundation National Aggregates, Inc Nicholas Richards Off The Wall Signs Ohio Water Haulers, LLC Paul W. Gross Piergallini Catering Premier Services Inc. Providence Minerals, LLC Quaker City Septic Tank Ray H. Thomas & Suzi A. Thomas Raymond Burkey RCE Heat Exchangers, LLC Renee Lamp RF Linx, Inc **Richard Morrison Richland Township Trustees** Robert L. Stewart Rock Ridge Properties, Inc S.T.A.R.T., LLC. Salvus Trucking, LLC Shannon Glancy Shecklers Excavating, Inc Short Creek Township Shortcreek Sportsman Club, Inc Smithfield Volunteer Fire Spectrum Metal Working, LLC Spring Valley Finishers St. Clairsville Municipal Utilities Stateline Paving A Lindy Storm Ross Stratagraph NE, Inc

Susan Geis The Henderson Family Rev Trust The Mable J. Pittman Trust The Pest Detective The Safety Group, LLC The Salvation Army Cadiz The Scio Dining Fork Ruritan Club Therapeutic Connections Charitable Thomas F. Mitchell TK Gas Services. Inc Triangle Production Systems, Inc Triple J Oilfield Services United Chart Processors United Way of Guernsey County United Way of Jefferson County Valentine Troyer Village Lore City Village of Wintersville Warren Drilling Co., Inc Water Transport Waterford Tank & Fabrication Wickham Electric Co Willa Jean Linn William & Connie Miller William Ryan Watson Women In Action Against Cancer Womens Health Center of Jefferson Young Womens Christian Association

Congressional District 7

Abco Services, LLC AEP Ohio American Electric Power Co AMG Industries Ariel Corporation Beaver Excavating Company Bella Vista Landscaping, LLC BHR Realty, LLC Branam Fastening Systems, Inc Brett Berisford Buckeye Council Boy Scouts of Canton Drop Forge Canton Erectors, Inc Canton Hauling Canton Regional Chamber of Carlvard, LLC Carole R. Niederkofler Central Allied Enterprises, Inc Central Ohio Fabricators Craig Stasser Rev Trust Custom Cutters D&K Supply & Equipment, Inc Dansco Manufacturing & Pumping Unit Service Dilly Michael W. Dover Chemical Corporation **Five Star Fence**

Fives Bronx, Inc Gail L. Troyer Gambier Welding Garv R. Ross Grace Automation Services, Inc Hammon Tree & Associates Hampton Inn & Suites-Canton Hartville Kitchen Hilscher-Clarke Electric Holiday Inn Canton Innis Maggiore Agency Isgr Power Cable Co Jack E. Martin, Attorney At Law James Alan Epley John J. Dempsey Kimble Clay & Limestone Kimble Recycling & Disposal Knox Machine & Tool, Inc Krugliak Wilkins Griffiths and Mansfield Electric Supply Mckinley Grand Hotel Middaugh Enterprise Mid-East Truck & Tractor Service. Inc Miller & Company Sanitation Miller Septic Tank Cleaning & Porta Jon Rental Multi Products Co Ohio Land & Cattle, Inc Oxford Mining Company, LLC Patriot Forge Co Precision Geophysical, Inc Pride of The Hills Manufacturing, Inc Pro Football Hall of Fame Public Service Company of Oklahoma Robert & Marilvn Bergmever Robert B. Putnam Rolls-Royce Energy Systems, Sancast, Inc Sandra Knowles Rev Schmuck Farms, LLC Services Acquisition Co, LLC SML Contracting, Inc Southwestern Electric Power Co Stark Community Foundation Terra Star, Inc The Beaver Excavating Company The Weekender Ltd Timken Bearing Division Total Lubrication Mgmt Co United Way of Greater Stark Weaver Express Yankee Wire Cloth Product

Congressional District 8

CM-Tech, Inc IDM Computer Solutions, Inc Kone Cranes, Inc Numerics Unlimited, Inc Panelmatic Cincinnati, Inc Turn All Machine & Gear Co Yost Superior Company Circle A Welding

Congressional District 9

Ferry Cap & Setscrew Co The Kent Group The Mack Iron Works Company Tomlin Toledo Co, Inc United States Steel Corporation

Congressional District 10

4 Paws For Ability Batteries Plus Blanchard Grinding Services, Inc Ceso, Inc **Commercial Metal Fabricators** Dayton Forging & Heat Treating Co Dayton Superior Corporation Dimcogray Corporation Ferguson Construction Company Hargo Corporation LexisNexis Lucy Carolyn King Perez Miami Cast, Inc Mid Atlantic Storage Systems, Inc Mutual Tool Owens Boy L Sogeti USA, LLC Stanco Precision Manufacturing Teradata Operations, Inc United Grinding Technologies, Inc WCB Inc Xenia Foundry & Machine Co

Congressional District 11

A Firstenergy Company A Schulman, Inc A&M Green Properties, LLC Acme Industrial Company Advanced Fire Co, Inc AEP River Operations, LLC Aero Controlex Group, Inc Akron Childrens Hospital Edn American Waste Management Services Applied Industrial Technologies, Inc Asko, Inc Baker & Hostetler LLP Barnes Group, Inc. Berwyn Group Bico-Akron Brost Froundry Company Buckeye Rubber & Packing

OHIO - VENDOR LIST

BW Rogers Company Carboline Cleveland Gear Company Computer Task Group, Inc Constant Aviation, LLC **Development Dimensions** International, Inc Eaton Corporation Edward W. Daniel Co Elliott Co Envantage, Inc Environmental Management Fibergrate Composite Structures, In Gateway Safety, Inc Guild International Hahn Manufacturing Co Inforad, Inc Infosight Corporation KLM Controls, Inc Medcor, Inc Midwest Industrial Supply, Inc Mon Power Ninesigma, Inc Occupational Health Centers of Ohio Ohio & Erie Canalway Coalition Ohio Desk Co Ohio Transmission & Pump Oil Skimmers, Inc Penelec Pipe Line Development Co Plidco International, Inc Presrite Corporation. QPS America, Inc Quality Resources, LLC Roll-Kraft Root Inc Rose Metal Industries Santrol, Inc SAP Ag Shin Etsu Silicones of America, Inc Sifco Forge SignTech St. Marys Foundry, Inc Standard Energy Sales, Inc State Chemical Manufacturing Steam Systems, Inc Summitville Tiles. Inc Supply Technologies, LLC Tank Services Taylor Leasing Corporation The Equity Engineering Group, Inc The Garland Company, Inc The Hellan Strainer Company URS Corporation Vector Security, Inc Veritext Records Vorys, Sater, Seymour & Pease IIP

Waste Management of Ohio West Penn Power Co Wheeling & Lake Erie Railway Winncom Technologies Corporation Wodin. Inc.

Congressional District 12

Applied Industrial Tech Broderick Data Systems Center For Reliable Energy Systems Chevron Phillips Chemical Co LP CM-Tech. Inc Dixie Medical, Inc Dow Cameron Oil & Gas. LLC Eaton Hydraulics Electrical Reliability Services, In Elite Seismic Processing, Inc Elledge Gasketing & Supply Co Emerson Network Power Hercules Industries, Inc. Hull & Associates. Inc Kenton Iron Products, Inc Kiefner & Associates, Inc Kincaid Taylor & Gever Kinetics Noise Control Inc. Law General Contracting, Inc Leppert Machine Co., Inc Liberty Casting Co MHS Industrial Supply Nelson Tool Corporation Nexeo Solutions, LLC NGO Development Corporation Ohio Oil & Gas Association OOGA Producers Service Corporation Ramah Oil Co. LLC Resource One Solutions, LLC Rock Iron Corporation Rumpke of Northern Ohio, Inc Scioto Valve & Fitting Co The Gorman-Rupp Co Xcelerate Media

Congressional District 13

Ansco Machine Company Cubbison Evets Electric, Inc Geiger Teeple Smith & Hahn LLP Heavy Duty Industrial Services LLC Iron Eagle Enterprise, LLC John E. & Carla Welling Jr Logic Plunger Lift Mimi B Limited Partnership Mohawk Disposal Management NSK Industries, Inc Ohio Utilities Protection Service Pennsylvania Tool Sales & Service Pettigrew Pumping Service, Inc Polymer Machinery Co, Inc **PSK Steel Corporation** R&J Trucking, Inc Railworks Track Services, Inc Ready To Haul, LLC Republic Services, Inc Sanders Excavating, Inc SD Myers, Inc The Dearing Compressor & Pump Com US Safetygear, Inc W. Pol Contracting, Inc William R Pitoscia Youngstown Hard Chrome Plating

Congressional District 14

AB Resources, LLC ABB, Inc Association of General Counsel Baldwin International Bridgeway Search Group, Inc Carl E. Maltba Curtiss Wright Flow Control Enpac, LLC Ferro Corporation Gold Key Processing, Inc Great Lake Fasteners Hexpol Compounding Independence Excavating, Inc Milyo Kristine G. Milyo Michael D. Monode Marking Products MR Excavator Northeast Filter & Equipment Ohio Lumex Co, Inc Pepperl & Fuchs, Inc Rea Elektonik, Inc Rosemount Analytical, Inc Rosemount. Inc The Rovisys Company The Shelly Company

Vox Mobile, Inc Wiegand Custom Watch, LLC

Congressional District 15

BBU Environmental Services Ltd Foundation For Appalachian Kilbarger Investments Lean Enterprise, Inc Locher, Inc Memac Industries, Inc Miba Bearings Us, LLC Ohio University R&L Carriers, Inc South Central Power Company Telesis Technologies, Inc Titan Industrial Supply Tubular Techniques Tunnel Hill Reclamation, LLC

Congressional District 16

Akron Brass Manufacturing

OHIO - VENDOR LIST

Atlas Energy Resources, LLC Baaron, Inc Bico-Akron Bocor Holdings, LLC Champion Combustion Corporation Clark-Reliance Corporation Concrete Controls of Ohio Corrpro Companies, Inc Fedex Truckload Brokerage, Inc Georgia K. Bailey Gregory Rogers H A D, Inc Hammontree & Associates Ltd Hawthorne Bolt Works Corporation Horizontal Wireline Services, LLC ICI Metals, Inc J.R. Johnson Engineering, Inc Ken Miller Supply, Inc Lindsay Precast, Inc Logic Plunger Lift, Inc

Lytle Const, Inc Mellott Bronze, Inc Melvin H Miller Merit Pump & Equipment Company, Inc Miller Supply of WV, Inc National Lime & Stone Company Petroset Cemeting Services, Inc PJ Operating Corporation S&H Oilfield Services, LLC Sunpro Testamerica Air Emission Corporation Testamerica Analytical Testing Corporation Testamerica Laboratories, Inc The Great Lakes Construction Co TJC Enterprises, Inc Tru-Cut Saw, Inc Ultimate Jetcharters, LLC Yxlon Feinfocus, Inc